

Atty

Helon, Marvin T (for Wells Fargo – Conservator of the Estate)

Atty

Bagdasarian, Gary G. (Court appointed for Conservatee – Petitioner)

Atty

Motsenbocker, Gary L (for Robert Lowder, III and Marcia Lowder – co-conservators of the Person)

Petition for Compensation for Representation of Conservatee [Prob. C. 1470 & 1472  
(a)]

Age: 46 DOB: 08/14/65		<p><b>GARY BAGDASARIAN</b>, Petitioner, was Court appointed to represent the Conservatee on 08/11/10.</p> <p>Wells Fargo Bank was appointed Conservator of the Estate on 3/19/87 in Kern County Superior Court <i>(the Conservatorship of the Estate was transferred to Fresno Superior Court in 2007)</i>. Robert Lowder, III and Marcia Lowder were appointed as Co-Conservators of the Person on 10/13/10.</p> <p>Petitioner requests fees in connection with the representation of the Conservatee from 11/01/11 – 05/10/12.</p> <p>Petitioner <b>asks that he be paid</b> from the conservatorship estate for <b>15.20 hours @ \$250.00/hr. for a total of \$3,800.00 and \$25.00 for costs reimbursement for a total request of \$3,825.00.</b></p> <p>Services are itemized by date and include reviewing documentation re the accounting of the conservatee's estate, for the approval of the Substituted Judgment in connection with the marriage Premarital Agreement, writing letters in connection with creditors making claims on credit cards against the conservatee, meetings with the client regarding estate planning, drafting of a Will and Advanced Health Care Directive.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p>	
Cont. from				
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<input type="checkbox"/>	Letters			
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<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
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<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: JF
Reviewed on: 06/20/12
Updates:
Recommendation:
File 1 - McDaniels

**Petition to Determine Administration Expenses Allocable to Encumbered Property Prior to Satisfaction of Lien, and for Deposit of Purchase Money with Court in Satisfaction of Lien and Expenses (Prob. C. 10361.1, 10362)**

<b>DOD: 3-26-09</b>		<b>LORI GARCIA</b> , Administrator, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note:</b> This Probate Estate case was previously consolidated with Civil Case 10CECG03291 as LEAD; however, per Court order on 5-15-12, the cases were bifurcated and this Probate Estate case was reinstated as an active case.  Court records indicate that Civil Case 10CECG03291 has been dismissed.  1. If additional charges are requested, need itemization and the Court may require further proof of service of supplement on interested parties.  2. Need order.  <b>Note:</b> The Court will set a status hearing for the filing of a petition for final distribution on Friday 9-28-12.  Reviewed by: skc Reviewed on: 6-21-12 Updates: Recommendation: File 2 - Garcia
		<b>Petitioner states</b> The I&A value of certain estate real property was \$175,000.00 as of the Decedent's date of death (3-26-09); however, a recent appraisal reflects a current value of \$120,000.00. Petitioner believes the decline in value is due to market conditions applicable to the community in general. Petitioner has entered into an agreement to sell the real property for <b>\$122,000.00 cash</b> .  However, the property is encumbered by a secured credit line to Wells Fargo Bank, originally for \$160,000.00. <b>Wells Fargo has filed a Creditor's Claim for \$157,072.34.</b>  The sales price, which is in excess of the current appraised value, is less than the amount claimed by Wells Fargo under their Deed of Trust.  <b>Petitioner brings this petition pursuant to Probate Code §10361.5 to determine the amount of expenses of administration that are reasonably related to the administration of the encumbered property and to determine the expenses of the sale payable from the sales proceeds. The balance of the sales proceeds shall be paid to Wells Fargo Bank as the secured creditor.</b>  <b>The expenses of administration reasonably related to the administration of the encumbered property are:</b> <ul style="list-style-type: none"> <li>\$16,513.32, computed as set forth on Exhibit D, and include estimated statutory fees allocable to the property based on the inventory value less loss, extraordinary fees to Petitioner and her attorney for the sale of the real property, filing fees, and additional attorney's fees incurred in filing this petition, together with costs to be advanced. They also include expenses paid for the care, preservation and maintenance of said property during the course of administration.</li> <li>The expenses of sale are the sum of \$15,641.12, computed as set forth on Exhibit E, and include real estate commissions, escrow charges and documentary transfer tax. They also include unpaid property taxes and penalties in the amount of \$7,104.97.</li> <li>Petitioner will incur additional charges in serving notice of hearing on this petition pursuant to Probate Code §10361.6 and may incur additional attorney's fees for appearing at the hearing on this petition. Said additional fees and costs will be presented in a supplement to this petition prior to the hearing date.</li> </ul>	
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	W	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
✓	<b>Letters</b>	5-12-09	
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202 Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		

**SEE PAGE 2**

**Page 2**

Petitioner requests that following the hearing and approval of this petition, the purchase money be paid the clerk of the court to be disbursed as provided in Probate Code §10362, or alternatively, that the Court order Fidelity Title, the escrow agent in this transaction, to pay and distributed funds as prescribed by statute.

**Petitioner requests:**

1. That the court determine the amount of expenses of administration reasonably related to the administration of the encumbered property;
2. That the court determine the expenses of sale of said property;
3. That the court order the proceeds from the sale to be paid to the Clerk of Court or alternatively to Fidelity National Title Company, escrow holder in this transaction;
4. That upon such payment the lien on the property be discharged;
5. That the Clerk or Fidelity National Title Company be ordered to pay and disburse the proceeds of sale requested in this petition or as otherwise ordered by the Court; and
6. For such further orders as the Court may deem proper.

## Order to Show Cause Re: Failure to File an Inventory and Appraisal; Failure to File a First Account; Proposed Sanctions in the Amount of \$500.00

<b>Age:</b> 89	<b>MARGUERITE S. HUGHES</b> , Niece, was appointed Conservator of the Person with medical consent and dementia medication and placement powers with <b>bond of \$412,500.00</b> on 5-17-10. Bond was filed 8-12-10 and Letters issued on 9-15-10.  On 10-6-10, notice t was filed showing that the Conservator had changed an existing account to reflect conservatorship (balance \$24,467.03).  On 7-25-11, the Court set a status hearing for failure to file an Inventory and Appraisal and a First Account. The hearing was set for 9-6-11.  On 9-6-11, the Court continued the matter to 10-11-11 based on Attorney Watson's representation that he was closing to filing the documents.  <b>However, on 10-11-11, there were no appearances.</b> The Court set an Order to Show Cause for 12-13-11 that was continued to 2-7-12, 3-20-12 and then 5-1-12, based on Attorney Watson's representation that the accounting was ready – he just had to insert the numbers.  <b>On 5-1-12, there were no appearances. The Court removed MARGUERITE S. HUGHES as Conservator and appointed PUBLIC GUARDIAN as Successor Conservator, and set this Order to Show Cause for 6-26-12 regarding the failure to file an Inventory and Appraisal and failure to file a first account, and proposed sanctions of \$500.00. The Court ordered Marguerite Hughes and Dennis Watson to be present on 6-26-12.</b>  Letters issued to PUBLIC GUARDIAN on 5-17-12.  <u><b>On 5-18-12, an Inventory and Appraisal and First Account were filed. See Page 3B.</b></u>  <u><b>Attached to the Account: Declaration of Attorney Re: Failure to Attend Last Hearing and Request that Petitioner be reinstated as Conservator with an Order Nunc Pro Tunc.</b></u>  <b>SEE PAGE 2</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>Note:</b></u> Please see Page 2 re: <b>Attorney Watson's Declaration attached to the Account filed 5-18-12.</b>  <u><b>Minute Order 5-1-12:</b></u> No appearances. The Court removes Marguerite Hughes as the conservator and appoints the Public Guardian. The Court sets the matter for an Order to Show Cause on 6/26/12 regarding the failure to file an inventory and appraisal; failure to file a first account, and the proposed sanctions in the amount of \$500.00. The Court orders Marguerite Hughes and Dennis Watson to be present on 6/26/12. Continued to 6/26/12, 9:00 a.m., Dept. 303 Set on 6/26/12, 9:00 a.m., Dept. 303 for Order to Show Cause Re: Failure to File an Inventory and Appraisal; Failure to File a First Account; Proposed Sanctions in the Amount of \$500.00.
<b>DOB:</b> 9-26-22		
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
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<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
✓ <b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
	<b>Reviewed by:</b> skc	
	<b>Reviewed on:</b> 6-21-12	
	<b>Updates:</b>	
	<b>Recommendation:</b>	
	<b>File 3B - Peters</b>	

**Declaration of Attorney Re: Failure to Attend Last Hearing and Request that Petitioner be reinstated as Conservator with an Order Nunc Pro Tunc:**

Attorney Watson apologizes to the court for his non-appearance at the last scheduled hearing which was an OSC. When he received the last continuance on court call he heard the judge's speech on the need for attorneys to try and not continue matters as this results in additional costs for the court administration. He noted that, but failed to calendar the continuance date. However, there are mitigating circumstances.

The timing of this conservatorship has come at a difficult time for both his client and himself. The conservator was diagnosed with stage 3 colon cancer, had surgery on 3-30-11, and went through chemo from May-December 2011.

At this point, she has regained her health and has been actively working with Attorney Watson to produce the accounting.

As for Attorney Watson, his wife was diagnosed with 7 brain tumors in mid-2011 and a metastasizing of a breast cancer from 2008. In July 2011 she was diagnosed with tumors in her brain, lungs, kidney and liver, and had surgery on one that would have been fatal within weeks. Six weeks later there was another tumor that had to be removed as it was causing pressure in her cranium. She passed away on 1-31-12.

Attorney Watson tried during this time to continue as a sole practitioner to make up for lost income as a result of his wife's declining health. After her death, he was hit with the fact that he was behind in many cases and expectations from other clients. His State Bar record is clear, and he realized that he had to step up efforts to keep it clear by working as hard as he could. In doing so, there have been times when his schedule was messed up, and his failure to appear was a result of stress, busyness, and frankly, carelessness. The failure to appear was at the worst time for him.

Attorney Watson states he understands that if the Court needs to sanction him as a process of showing seriousness about the matter of continuances and nonappearances he will accept the sanction, and will be paying any sanction that his client is assessed.

Marguerite Hughes is a wonderful Conservator. She has worked through sickness to get done what needed to be done. She is caring in dealing with her aunt and has experience in financial matters, and but for the life circumstances, there would have been no problem with getting the account done timely.

**Attorney Watson asks that the Court revisit the previous order and to not relieve her as Conservator and to allow her to continue her outstanding work.**

(1) First Accounting & Report of Conservator; (2) Petition for Allowance of Fees & Costs to Conservator of Person and Estate; (3) Attorney's Fees; (4) Reinstatement of Conservator with an Order Nunc Pro Tunc

<b>Age: 89</b>		<b>MARGUERITE S. HUGHES</b> , Niece and Former Conservator of the Person and Estate, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>DOB: 9-26-22</b>			
		Bond is \$412,500.00 ( <i>not sufficient</i> )	<b>Minute Order 5-1-12:</b> No appearances. The Court removes Marguerite Hughes as the conservator and appoints the Public Guardian. The Court sets the matter for an Order to Show Cause on 6/26/12 regarding the failure to file an inventory and appraisal; failure to file a first account, and the proposed sanctions in the amount of \$500.00. The Court orders Marguerite Hughes and Dennis Watson to be present on 6/26/12, 9:00 a.m., Dept. 303 Set on 6/26/12, 9:00 a.m., Dept. 303 for Order to Show Cause Re: Failure to File an Inventory and Appraisal; Failure to File a First Account; Proposed Sanctions in the Amount of \$500.00.  <b>SEE PAGE 2</b>
		Account period: 5-17-10 through 5-17-11	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Accounting: \$586,444.12	
<input checked="" type="checkbox"/>	<b>Verified</b>	Beginning POH: \$431,535.12	
<input type="checkbox"/>	<b>Inventory</b>	Ending POH: \$480,744.00	
<input type="checkbox"/>	<b>PTC</b>	<b>Conservator: \$3,788.90</b> (\$3,200.00 in fees, plus mileage costs of \$588.90 for over 150 hours providing services for her aunt including visiting on a regular basis to ensure her needs are being met, meeting with the staff dietitian, social services director and physician and nurse, and also calling other relatives who visit for their thoughts on her condition and needs. She also marshaled assets, paid all bills promptly, and managed the estate frugally. The amount requested works out to about \$30/hr for time and travel to visits, court hearings, etc. Ms. Hughes lives in Hanford. Itemization on Schedule 1)  <b>Attorney: \$2,000.00</b> Per local rule  <b>Declaration of Attorney Re: Failure to Attend Last Hearing and Request that Petitioner be reinstated as Conservator with an Order Nunc Pro Tunc is attached to the account.</b>  <i>(The Declaration is reviewed at Page 3A with reference to the OSC.)</i>  <b>Petitioner prays for an Order:</b> 1. Approving and settling the account; 2. Authorizing the Conservator's and Attorney's fees and costs; and 3. Reinstating Marguerite Hughes as Conservator of the Person and Estate.  <b>Attorney Nancy LeVan filed an Objection to First Acct on 6-21-12.</b>  <b>SEE PAGE 2</b>	
<input type="checkbox"/>	<b>Not.Cred.</b>		
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<input type="checkbox"/>	<b>Duties/Supp</b>		
<input checked="" type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>2620(c)</b>		
<input type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

Reviewed by: skc

Reviewed on: 6-21-12

Updates: 6-22-12

Recommendation:

File 3C - Peters

**Atty Watson, Dennis L. (for Marguerite S. Hughes – Niece – Former Conservator)**  
**Atty Kruthers, Heather (for Public Guardian – Successor Conservator)**

**(1) First Accounting & Report of Conservator; (2) Petition for Allowance of Fees & Costs to Conservator of Person and Estate; (3) Attorney's Fees; (4) Reinstatement of Conservator with an Order Nunc Pro Tunc**

**Attorney LeVan is the Objector and states:**

- There should be a bond increase of at least \$100,000.00 because of the value of the property on hand at the end of this accounting.
- The description of cash assets includes IRAs that appear to include the values of the policies themselves. Need clarification.
- The petition has two different amounts being requested for compensation - \$4,500.00 and \$3,788.90.
- The attorney's itemization is lacking in detail. On behalf of the Conservatee, Attorney LeVan would object to the \$6,000.00 in fees.
- On behalf of the Conservatee, Attorney LeVan has no objection to having Marguerite Hughes being reinstated as Conservator. It appears she and her attorney went through extraordinary circumstances last year and some allowance can be made for these unfortunate events.

**Objector prays that the Court orders** clarification on the amount of compensation by Conservator, reduction of attorney fees and more detail regarding services, increase in bond, and any other orders the court deems appropriate (Proposed order submitted).

**Note: Attorney LeVan's appointment was terminated per Minute Order 7-28-11. Examiner notes that the objection states that Attorney LeVan is the Objector, but she also signs on behalf of the Conservatee, for whom her appointment was terminated.**

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**NEEDS/PROBLEMS/COMMENTS (Continued):**

1. **Attorney Watson originally requested \$3,500.00 in fees; however, Examiner noted that the Court may require clarification with regard to the itemization at Schedule 2 pursuant to Cal. Rules of Court 7.751.b. and 7.702. (For example, the requests states 20 hours was spent in preparation of documents for establishing conservatorship.)**  
**Pursuant to Supplement filed 6-22-12, the request is reduced to \$2,000.00 pursuant to Local Rule.**
2. **If Petitioner is reinstated as Conservator, the current bond (\$412,500.00) is insufficient based on the current POH and income during this account period. Bond should be increased by \$289,432.48 for a total bond of \$701,932.48, which includes cost of recovery pursuant to Probate Code 2320(c)(4) and Cal. Rules of Court 7.207.**  
**Pursuant to Supplement filed 6-22-12, the bond should be increased. Petitioner agrees to an amount of the increase at the Court's discretion.**
3. **Pursuant to Supplement filed 6-22-12, Petitioner states that as for matters brought up by Attorney LeVan, the issue of placement of IRAs on Attachment 1 rather than Attachment 2 was because these were understood to be cash IRAs. A tax deferred account was placed on Attachment 2 to be valued by the referee because it was not a cash account. The Court may require clarification**
4. **Need Order.**





Atty Marchini, Joseph M (of BMJ, for Daniel L. Serimian – Beneficiary – Petitioner)

Atty Salisch, Victoria J.(of Lang, Richert &amp; Patch, for Leslie A. Morgan)

Atty Jones, Timothy (of Wanger Jones Helsey, PC, for Donald Serimian and David Serimian)

Petition for Order for Accounting, Surcharge of Trustee, Removal of Trustee, and  
Instructions to Partition, Terminate and Distribute Trust Estate [Prob. C. 15403,  
15642, 16420, 16440, 17200(a), 17200(b)(7)]

		NEEDS/PROBLEMS/COMMENTS:
		<b><u>OFF CALENDAR</u></b>
		This case has been consolidated with 11CECG03770 as LEAD.
		Per Minute Order 4-18-12: All further documents filed in the case number of the lead case, followed by the case number of the other consolidated cases. Matter designated complex per Rule of Court. <u>No further filing in Probate Court.</u> June 26, 2012 Probate Petition off calendar.
		Reviewed by: skc
		Reviewed on: 6-20-12
		Updates:
		Recommendation:
		File 5A - Serimian

Atty

Marchini, Joseph M (of BMJ, for Daniel L. Serimian – Beneficiary – Petitioner)

Atty

Salisch, Victoria J.(of Lang, Richert &amp; Patch, for Leslie A. Morgan)

Atty

Jones, Timothy (of Wanger Jones Helsey, PC, for Donald Serimian and David Serimian)

Petition for Order for Accounting, Surcharge of Trustee, Removal of Trustee, and Instructions to Partition, Terminate and Distribute Trust Estate [Prob. C. 15403, 15642, 16420, 16440, 17200(a), 17200(b)(7)]

		NEEDS/PROBLEMS/COMMENTS:
		<b><u>OFF CALENDAR</u></b>
		This case has been consolidated with 11CEG03770 as LEAD.
		Per Minute Order 4-18-12: All further documents filed in the case number of the lead case, followed by the case number of the other consolidated cases. Matter designated complex per Rule of Court. <u>No further filing in Probate Court.</u> June 26, 2012 Probate Petition off calendar.
		Reviewed by: skc
		Reviewed on: 6-20-12
		Updates:
		Recommendation:
		File 6A - Serimian

Atty Marchini, Joseph M (of BMJ, for Daniel L. Serimian – Beneficiary – Petitioner)

Atty Salisch, Victoria J.(of Lang, Richert &amp; Patch, for Leslie A. Morgan)

Atty Jones, Timothy (of Wanger Jones Helsey, PC, for Donald Serimian and David Serimian)

Petition for Order for Accounting, Surcharge of Trustee, Removal of Trustee, and  
Instructions to Partition, Terminate, and Distribute Trust Estate [Prob. C. 15403,  
15642, 16420, 16440, 17200(a), 17200(b)(7)]

NEEDS/PROBLEMS/COMMENTS:

**OFF CALENDAR**

This case has been consolidated  
with 11CECG03770 as LEAD.

Per Minute Order 4-18-12: All  
further documents filed in the  
case number of the lead case,  
followed by the case number of  
the other consolidated cases.  
Matter designated complex per  
Rule of Court. No further filing in  
Probate Court. June 26, 2012  
Probate Petition off calendar.

Reviewed by: skc

Reviewed on: 6-20-12

Updates:

Recommendation:

File 7A – Sark-Leslie

		NEEDS/PROBLEMS/COMMENTS:
		<b><u>OFF CALENDAR</u></b>
		This case has been consolidated with 11CECG03770 as LEAD.
		Per Minute Order 4-18-12: All further documents filed in the case number of the lead case, followed by the case number of the other consolidated cases. Matter designated complex per Rule of Court. <u>No further filing in Probate Court.</u> June 26, 2012 Probate Petition off calendar.
		Reviewed by: skc
		Reviewed on: 6-20-12
		Updates: 6-20-12
		Recommendation:
		File 8A – Sark-Lionel

**Amended Petition for Order Instructing Trustee, Confirming Ownership of Trust Assets, and Approving Final Distribution from Trust [Prob. C. 850, 17200(b)(4), (5) & (6)]**

<b>DOD: 7-4-10</b>		<b>JANE DELLA FAIN</b> , Successor Trustee of the <b>2003 ONELLA E. SPEEGLE REVOCABLE TRUST as amended 12-8-03</b> , is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 042512</b>		Petitioner states the trust provides for distribution on the settlor's death of one share to each of the settlor's children who survive her. The settlor was survived by three children, Joyce Onella Lopez, Jean Elisabeth Reeves, and Jane Della Fain. There were also two deceased children.	<p><b>Note: Notice of Settlement filed 4-17-12 by Attorney Krbechek states the matter has been settled in its entirety, except the terms and conditions of the settlement will not be completed until <u>6-30-12</u>. A Request for Dismissal will be filed within 45 days of the completion date.</b></p>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>	The trust contains two parcels of real property and cash and marketable securities with a total balance sheet value of \$322,000.	<p><b>1. Petitioner appears to request an order at this time, and also a further order after distributions have been made (#7 of the prayer).</b></p> <p><b>The Court may require further petition at a later time for such further order.</b></p>
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>	Petitioner wishes to sell the real property, pay attorney fees, costs and expenses of administration from the trust assets, and distribute in equal shares to the three surviving children and bring trust administration to a close; however, the three beneficiaries are unable to agree on a distribution in kind.	<p><b>2. Need order.</b></p>
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Beneficiary Jean Elisabeth Reeves resides in the residence on N. Wilson and communications have broken down. Further, Ms. Reeves has suggested in the past that she is the owner of the property, and Petitioner also seeks a determination that the trust is the owner of the property (deeds attached).	<p><b>Reviewed by: skc</b></p> <p><b>Reviewed on: 6-19-12</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 9 - Speegle</b></p>
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> w/o		
<input type="checkbox"/>	<b>Aff.Pub.</b>	<p><b>Petitioner prays for an Order:</b></p> <ol style="list-style-type: none"> <li>1. Confirming that Petitioner as trustee is the holder of title to the real property on N. Wilson, free and clear from all ownership claims or other adverse interests asserted by Jean Elisabeth Reeves;</li> <li>2. Authorizing and instructing Petitioner to engage a real estate broker to market and sell the real property on N. Wilson;</li> <li>3. Authorizing and instructing Petitioner to engage a real estate broker to market and sell the real property on N. Van Ness;</li> <li>4. Upon such sale, authorizing and instructing Petitioner to distribute the cash proceeds therefrom in three equal shares to the beneficiaries after payment of the ordinary and necessary attorney fees, costs and expenses of trust administration;</li> <li>5. Authorizing and instructing Petitioner to hold \$6,000.00 from the cash on hand to pay projected costs and expenses in connection with trust administration;</li> <li>6. Authorizing and instructing Petitioner to distribute the remaining cash and securities held in the trust estate in three equal shares to the beneficiaries;</li> <li>7. Upon such distributions, for an order terminating the trust; and</li> <li>8. Such other and further relief as the Court may deem just, equitable and proper.</li> </ol>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b> X		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

Age: 19		<b>NO TEMPORARY REQUESTED</b>  <b>PATSY ZUNIGA</b> , Mother, is Petitioner and requests appointment as Conservator of the Person and Estate without bond. <i>(Note: Estate denied per minute order 3-6-12)</i>  <b>Voting Rights affected</b>  <b>A copy of a Capacity Declaration was filed 1-24-12.</b>  <b>Petitioner states</b> the proposed conservatee was born with Down Syndrome and is unable to provide for her own physical health, clothing or shelter. She is unaware of the costs of shelter or food and does not have capacity to seek medical attention if needed. The paternal grandparents have been caring for her since she was two months old, but are now "getting up in years" and it is increasingly difficult for them to care for her.  <b>Petitioner requests appointment as Conservator of the Estate without bond</b> because she is a full time student and lacks the funds to post bond. Specifically, Petitioner requests the ability to administer any and all financial obligations and/or accounts in regards to the proposed conservatee's assets and debt, and for care, custody and control of all real property, if any, including the right to sell, convey, or transfer, or maintenance/collection of rents on rental property, if any.  Petitioner states that although the proposed conservatee currently resides in Fresno, it would be in her best interest to reside in Stanislaus County. Petitioner is ready and able to provide adequate living arrangements. Petitioner states that when they see each other, the proposed conservatee begs to come home with Petitioner. Petitioner attached copies numerous letters in support of the petition from friends and family.  <b>Court Investigator Samantha Henson filed a report on 2-29-12 and a Supplemental Report on 5-10-12.</b>  <div style="text-align: center;"><b>SEE PAGE 2.</b></div>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Court Investigator advised rights on 2-15-12.</u>  <u>Voting rights affected-Need minute order.</u>  <u>Continued from 3-6-12.</u>  <u>Minute Order 3-6-12:</u> Examiner notes are provided to counsel. <u>The Court denies the Petition for Appointment of Conservator of the Estate and continues the Petition for Appointment of Conservator of the Person to 5/15/12.</u> The Court orders that a court investigator contact all the parties for purposes of determining suitability.  <u>Minute Order 5-15-12:</u> Matter continued to 6-26-12 at the request of counsel. Parties appearing advised of the continuance.  <u>Note: Petitioner resides in Modesto, CA. The proposed conservatee (Krishna) resides in Fresno with her paternal grandparents, Eddie and Linda Galaviz, who were formerly her legal guardians in Case #0522953.</u>  <u>As of 6-20-12, nothing further has been filed. The following issues remain:</u>  <div style="text-align: center;"><b>SEE PAGE 2</b></div>	
DOB: 7-2-92				
Cont. from 030612, 051512				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			X
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input checked="" type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
		Reviewed by: skc Reviewed on: 6-20-12 Updates Recommendation: File 10A - Galaviz		

**NEEDS/PROBLEMS/COMMENTS (Continued):**

**1. Attorney Ben Roberts did not sign the Petition.**

**2. If Petitioner is seeking medical consent powers, need original Capacity Declaration.**

*Note: Petitioner does not request medical consent powers at 1.g. of the Petition. Petitioner states the original Capacity Declaration was filed in Stanislaus County and provides a copy; however, this Court may require an original.*

*If requested, the Court may also require amended petition and service on all parties of the additional request for medical consent powers.*

**3. Notice of Hearing filed 2-8-12 indicates the paternal grandparents (with whom Krishna resides) were served together rather than individually per Cal. Rule of Court 7.51(a)(1). The Court may require amended service.**

*- Examiner notes that the paternal grandparents Linda and Eddie Galaviz have been attending the hearings, along with a "Mary Smith." Examiner is unsure who "Mary Smith" is.*

**4. Need proof of service of Notice of Hearing with a copy of the Petition at least 30 days prior to the hearing on the Regional Center pursuant to Probate Code §1822(e).**

**Note: The above items have been noted since the first hearing on 3-6-12.**

		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>CONFIDENTIAL</u>
Cont. from 030612, 051512		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 6-20-12
		Updates:
		Recommendation:
		File 10B – Galaviz

**10B**



Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C.  
1820, 1821, 2680-2682)

Age: 80 DOB: 10/04/31		<p><b><u>NO TEMPORARY REQUESTED</u></b>  <b>MICHAEL H. SMITH and JENNA R. SMITH</b>, son and granddaughter, are Petitioners and request appointment as Co-Conservators of the Person with medical consent and dementia powers to administer dementia medications and for appointment as Co-Conservators of the Estate with the powers pursuant to Probate Code § 2590, without bond. Petitioners are also requesting that Benjamin H. Smith, the proposed conservatee's husband, account for all community assets.</p> <p><b><u>ESTIMATED VALUE OF THE ESTATE:</u></b>            Personal property - \$ 20,000.00            Annual income - 56,600.00            Real property - 500,000.00</p> <p>Voting rights affected.</p> <p>Petitioners state that the proposed conservatee suffers from advanced dementia and severe short term memory loss. She recently also suffered a series of small strokes and her health has been declining. Petitioners state that in April 2012, the proposed conservatee's physician opined that she should be placed in a nursing home and completed the necessary documents to have Petitioner Michael H. Smith succeed her as the trustee of her Trust. Petitioners state that the proposed conservatee's husband, Ben Smith, also has dementia and exhibits violent behavior toward Dorothy. Further, Dorothy's grandson, Michael H. Smith, Jr. ("Butch") has control over Ben's finances and person and may be taking advantage of Dorothy's financial affairs as well.</p> <p><b>Court Investigator Dina Calvillo filed a report on 06/21/12.</b></p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Court Investigator advised Rights on 06/12/12.</b>  <b>Voting rights affected – Need Minute Order.</b>  1. Petitioners are requesting the dementia power to administer dementia medications; however, the capacity declaration of Cecil Bullard, M.D. is not complete at item 9(b) regarding the administration of dementia medications. Further, the capacity declaration is incomplete at item 6(e).  2. Petitioners are requesting appointment without bond; however, effective 1/1/2008, pursuant to CRC 7.207, except as otherwise provided by statute, every conservator or guardian of the estate appointed after 12/31/2007, must furnish a bond, including a reasonable amount for the cost of recovery to collect the bond under Probate Code 2320(c)(4)). Based on the assets of the estate as stated in the Petition, bond should be set at \$635,792.00 (bond calculator worksheet in file).  3. Petitioners are requesting the court grant powers under Probate Code § 2590, which powers are outlined in § 2591; however, pursuant to Local Rule 7.15.2 - it is the policy of the court to grant a guardian or conservator only those independent powers necessary in each case to administer the estate. A request for all powers described in Probate Code § 2591 will not be granted by the court. Each independent power requested must be justified by, and narrowly tailored to the specific circumstances of that case. Any powers so granted must be specified in the order and in the Letters of Guardianship or Conservatorship.	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail		w/o	
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt		x	
	CI Report		x	
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation	x		
	FTB Notice			

Continued on Page 2	
Reviewed by: JF	
Reviewed on: 06/21/12	
Updates:	
Recommendation:	
File 11 - Smith	

**Needs/Problems/Comments Cont'd:**

4. Need Citation.
5. Need receipt for viewing of conservatorship video.
6. Proof of Service of the Notice of Hearing reflects that Benjamin Smith (proposed conservatee's husband) was mailed Notice in care of Grace McCarter. Pursuant to CRC 7.51 (a) direct notice is required. Notice mailed to a person in care of another person is insufficient unless the person entitled to notice has directed to send notice in care of another person in writing.

**Note:** Notice of Related Case filed 5-29-12 indicates that a Domestic Violence Restraining Order against Butch (12CEFL02286) expires 8-8-12.

**Note:** The proposed conservatee filed a petition to be appointed as conservator of the person of her husband Ben Smith in Sept. 2011. The case was voluntarily dismissed by Ms. Smith after the parties reached a stipulated settlement on 11/02/11.

**Note: If the petition is granted status hearings will be set as follows:**

- **Friday, 08/03/2012 at 9:00a.m. in Dept. 303** for the filing of the Bond;
- **Friday, 11/16/2012 at 9:00a.m. in Dept. 303** for the filing of the inventory and appraisal; **and**
- **Friday, 08/16/2013 at 9:00a.m. in Dept. 303** for the filing of the first account

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

<b>DOD: 10/01/09</b>		<b>CANDY ATKINS</b> , spouse, was appointed as Administrator without bond and Letters of Administration were issued on 12/03/09.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		After the appointment of Candy Atkins as Administrator, the decedent's Will was located and offered for probate. On 03/25/10 <b>CANDY ATKINS</b> , spouse, was subsequently appointed as Administrator with Will Annexed Letters were issued.	<p align="center"><b><u>OFF CALENDAR</u></b></p> <p><b>Status report filed 06/21/12, set the matter for hearing on 07/25/12</b></p>
<b>Cont. from</b>			
<b>Aff.Sub.Wit.</b>		<p>Status Report filed 08/12/11 by Candy Atkins states that there are no liquid assets of the estate to pay administration expenses and creditor's claims. Decedent's real property in Madera County was being listed for sale.</p> <p><b>Inventory &amp; Appraisal</b> filed 09/08/11 - \$209,700.00.</p> <p><b>Minute Order dated 09/26/11</b> set this matter for status of the sale of real property.</p>	<p><b>1. Need status update re: sale of real property.</b></p>
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			

<b>Age: 10</b> <b>DOB: 02/26/12</b>	<b>JENNIFER AUSTIN</b> , mother, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need proof of service by mail at least 15 days before the hearing of <b>Notice of Hearing</b> with a copy of the <b>Petition for Visitation</b> <u>or</u> Declaration of Due Diligence <u>or</u> Consent and Waiver of Notice for: - Ryan Ortiz (father) - Raymond Ortiz (paternal grandfather) - Lena Ackerman (paternal grandmother) - Mark Austin (maternal grandfather)
<b>Cont. from</b> <input type="checkbox"/> <b>Aff.Sub.Wit.</b> <input checked="" type="checkbox"/> <b>Verified</b> <input type="checkbox"/> <b>Inventory</b> <input type="checkbox"/> <b>PTC</b> <input type="checkbox"/> <b>Not.Cred.</b> <input checked="" type="checkbox"/> <b>Notice of Hrg</b> <input checked="" type="checkbox"/> <b>Aff.Mail</b> <input type="checkbox"/> <b>Aff.Pub.</b> <input type="checkbox"/> <b>Sp.Ntc.</b> <input checked="" type="checkbox"/> <b>Pers.Serv.</b> <input type="checkbox"/> <b>Conf. Screen</b> <input type="checkbox"/> <b>Letters</b> <input type="checkbox"/> <b>Duties/Supp</b> <input type="checkbox"/> <b>Objections</b> <input type="checkbox"/> <b>Video Receipt</b> <input type="checkbox"/> <b>CI Report</b> <input type="checkbox"/> <b>9202</b> <input type="checkbox"/> <b>Order</b> <input checked="" type="checkbox"/> <b>x</b> <input type="checkbox"/> <b>Aff. Posting</b> <input type="checkbox"/> <b>Status Rpt</b> <input type="checkbox"/> <b>UCCJEA</b> <input type="checkbox"/> <b>Citation</b> <input type="checkbox"/> <b>FTB Notice</b>	<b>JANE BOULGER</b> , maternal grandmother, was appointed as Guardian of the Person and Letters of Guardianship were issued to her on 04/18/12. <b>(Served by mail on 06/05/12)</b>  Father: <b>RYAN ORTIZ</b>  Paternal grandfather: RAYMOND ORTIZ Paternal grandmother: LENA ACKERMAN  Maternal grandfather: MARK AUSTIN  Petitioner states that she would like visitation with her son from Fridays at 4:30pm to Sunday at 6:00 pm. She states that she has a permanent and stable residence, income to provide Rylan with food and clothing. Petitioner states that she has access to a vehicle to provide transportation in case of an emergency or athletic event.	
		<b>Reviewed by:</b> JF <b>Reviewed on:</b> 06/21/12 <b>Updates:</b> <b>Recommendation:</b> <b>File 13 - Ortiz</b>

Atty Nelson, Jack (Pro Per- Petitioner – Son)

**Petition for Letters of Administration; Authorization to Administer Under IAEA  
(Prob. C. 8002, 10450)**

<b>DOD:05/28/2008</b>		<b>JACK NELSON</b> , son, is Petitioner and requests appointment as Administrator without bond.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Continued from 6/6/2012.</u> Minute Order indicates that the Petitioner has a deceased brother with children. The Court continued the matter to allow Petitioner the opportunity to give notice to the appropriate parties.  <b>The following issues remain to be addressed:</b> 1. Need name and date of death of Decedent's deceased brother.  2. Petitioner filed on 6/22/2012 Declaration of <b>KELLY NELSON</b> , Waiver of Notice; Waiver of Interest indicating she waives further notice of hearing, and <b>waives any interest in the Estate of Loyd Lovern Nelson</b> . Petitioner also filed on 6/22/2012 Declaration of <b>TERRI NELSON</b> , Waiver of Notice; Waiver of Interest indicating she waives further notice of hearing, and <b>waives any interest in the Estate of Loyd Lovern Nelson</b> . It appears Petitioner intends these Declarations to serve as disclaimers of interest as provided for under Probate Code § 275. It also appears that these Declarations may qualify as "writings" that disclaim the interest as provided for under Probate Code § 265. However, it is in the Court's discretion as to whether these Declarations will be deemed satisfactory and effective as disclaimers pursuant to Probate Code §§ 260 through 282.  3. Need Order.  <b>Note: If the petition is granted status hearings will be set as follows:</b> <ul style="list-style-type: none"> <li>• Friday, November 2, 2012 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <b>and</b></li> <li>• Friday, August 3, 2013 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.</li> </ul> Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
<b>Cont. from 060612</b>			
	Aff.Sub.Wit	Full IAEA- o.k.	
✓	Verified		
	Inventory		
	PTC	Decedent died intestate.	
	Not.Cred.		
	Notice of Hrg	N/A	
	Aff.Mail	Residence: Fresno	
✓	Aff.Pub.	Published: The Business Journal	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen	<b>Estimated value of the Estate:</b> Personal property: - \$500.00 Real property: - \$56,700.00 <b>Total: - \$56,700.00</b>	
✓	Letters		
✓	Duties/S		
	Objection	Probate Referee: Steven Diebert	
	Video Receipt		
	CI Report		
	9202		
	Order	x	
	Aff. Post		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
<b>Reviewed by:</b> KT/LEG/LV <b>Reviewed on:</b> 06/21/2012 <b>Updates:</b> 6/22/12 <b>Recommendation:</b> <b>File 14 - Nelson</b>			

Atty Salgado, Sara (Pro Per- Petitioner – Paternal Grandmother)

## Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 1 DOB: 10/22/2010		<b>No Temporary Requested</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>SARA SALGADO</b> , Paternal Grandmother, is petitioner.		1. Need Notice of Hearing	
		Father: <b>RICARDO ALAMEDA</b>		2. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Ricardo Alameda (Father)</li> <li>• Juanita Zuniga (Mother)</li> </ul>	
<b>Cont. from</b>		Mother: <b>JUANITA ZUNIGA</b>		3. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• Paternal grandfather (Not Listed)</li> <li>• Maternal grandparents (Not Listed)</li> </ul>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			4. Need Letters	
<input checked="" type="checkbox"/>	<b>Verified</b>	Paternal grandfather: Not Listed		5. Need Order	
<input type="checkbox"/>	<b>Inventory</b>			6. Petitioner did not answer #2 of the Confidential Guardian Screening form regarding whether she is or is not required to register as a sex offender.	
<input type="checkbox"/>	<b>PTC</b>				
<input type="checkbox"/>	<b>Not.Cred.</b>	Maternal grandfather: Not Listed			
<input type="checkbox"/>	<b>Notice of Hrg</b>	<input checked="" type="checkbox"/>	Maternal grandmother: Not Listed		
<input type="checkbox"/>	<b>Aff.Mail</b>	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	<b>Aff.Pub.</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Pers.Serv.</b>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Letters</b>	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Objections</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Video Receipt</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>CI Report</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>9202</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Order</b>	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	<b>Aff. Posting</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Status Rpt</b>	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	<b>UCCJEA</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>Citation</b>	<input type="checkbox"/>			
<input type="checkbox"/>	<b>FTB Notice</b>	<input type="checkbox"/>			
				<b>Reviewed by:</b> LEG / LV	
				<b>Reviewed on:</b> 06/21/2012	
				<b>Updates:</b>	
				<b>Recommendation:</b>	
				<b>File 15 - Alameda</b>	

Atty Quintanar, Jeanette Reymondo (pro per Petitioner/maternal grandmother)

## Petition for Appointment of Guardian of the Person (Prob. C. 2250)

Age: 1 ½ years DOB: 8/7/2010		<b>TEMPORARY EXPIRES 5/7/2012; extended to 6/26/2012</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>JEANETTE REYMONDO QUINTANAR</b> , maternal grandmother, is Petitioner.			
Cont. from		Father: <b>ISMAEL MARTINEZ ORTEGA</b> ; <i>consents and waives notice</i> ;			
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
✓	Notice of Hrg				
✓	Aff.Mail	W/			
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
✓	CI Report				
✓	Clearances				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
		<p>Mother: <b>KATHERINE AMENDA SANCHEZ</b>; <i>consents and waives notice</i>;</p> <p>Paternal grandfather: <b>Mr. Ortega</b>; <i>sent notice by mail 4/30/2012</i>;</p> <p>Paternal grandmother: <b>Maria Martinez</b>; <i>sent notice by mail 4/30/2012</i>;</p> <p>Maternal grandfather: <b>Manuel M. Sanchez</b>; <i>sent notice by mail 4/30/2012</i>;</p> <p><b>Petitioner states</b> the child has resided solely with her since October 2011, and prior to that the mother was also residing in Petitioner's home. Petitioner states the mother was diagnosed with bipolar disorder, schizophrenia, depression, has a history of suicidal tendencies, and has been 5150'd on at least two occasions. Petitioner states in January 2012, the mother came to Petitioner's home intent on taking the minor to Washington State, and Petitioner later discovered she did in fact leave to Washington, then came back and now stays with her (the mother's) father, Manuel Sanchez, who regularly provides childcare for Petitioner when she works out of town. Petitioner fears the mother may attempt to retrieve the child with no consideration of what is best for the child. Petitioner states the child's father agrees with the guardianship and visits the child about one weekend per month.</p> <p><b>Court Investigator Dina Calvillo's Report was filed 6/14/2012 and recommends the petition be GRANTED.</b></p>		<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 6/22/12</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 16 – Ortega-Sanchez</b></p>	

Michael, 13 DOB: 05/25/99		<b>TEMPORARY EXPIRES 06/26/12</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
Dominique, 12 DOB: 02/17/2000			
Cont. from		<b>LAURA MORONES</b> , maternal aunt, is Petitioner.  Father: <b>MICHAEL GONZALES</b> – <i>court dispensed with notice to the father on 05/10/12</i>  Mother: <b>YESENIA MARQUEZ</b>  Paternal grandfather: UNKNOWN Paternal grandmother: UNKNOWN  Maternal grandfather: JESUS MARQUEZ Maternal grandmother: TERESA MARQUEZ  Siblings: ALEXIS GARCIA (3), JACOB (age unknown)  Petitioner states that Michael has lived with her for the past 5 years and Dominique came to live with her recently when his mother moved to Los Angeles. Mother has two younger children and feels overwhelmed caring for three children. Mother has signed a letter giving Petitioner authority to make decisions regarding the boys. The father's whereabouts are unknown.  <b>Court Investigator Charlotte Bien's report was filed on 06/06/12.</b>	1. Need <b>Notice of Hearing</b> . 2. Need proof of personal service of <b>Notice of Hearing</b> at least 15 days before the hearing of with a copy of the <b>Petition for Appointment of Guardian</b> <u>or</u> Consent and Waiver of Notice <u>or</u> Declaration of Due Diligence for: - Yesenia Marquez (mother) - Michael Marquez (minor) - Dominique Marquez (minor) 3. Need proof of service by mail of <b>Notice of Hearing</b> at least 15 days before the hearing of with a copy of the <b>Petition for Appointment of Guardian</b> <u>or</u> Consent and Waiver of Notice <u>or</u> Declaration of Due Diligence for: - paternal grandparents (unknown) - Jesus Marquez (maternal grandfather) - Teresa Marquez (maternal grandmother)
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	x	
<input type="checkbox"/>	Aff.Mail	x	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	x	
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			<b>Reviewed by:</b> JF <b>Reviewed on:</b> 06/21/12 <b>Updates:</b> <b>Recommendation:</b> <b>File 17 - Marquez</b>



Age: 4 DOB: 01/15/2008		<b>TEMPORARY EXPIRES 06/20/2012</b> <b>GENERAL HEARING 08/08/2012</b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Continued from 6-20-12.</u> <u>Minute Order 6-20-12:</u> <b>UCCJEA provided to Ms. Hanson. Mother is not in favor of the guardianship. Temporary Letters extended to 6-26-12.</b>  <b>Page 18B is a Competing Temporary Petition by the Paternal Grandparents, Ray and Brenda Dean.</b>  1. Notice of Hearing filed 06/18/2012 appears to be a copy. Court may require the original or an amended Notice of Hearing.  2. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: • James ward (Father)  3. UCCJEA is incomplete at Page 2 #4-6 regarding any other cases relating to this minor per Probate Code §1510(f).
		<b>STACEY R. HANSON</b> , Maternal Grandmother, is Petitioner  Father: <b>JAMES WARD</b>  Mother: <b>MEIGHANN MARIA PEREZ-HANSON</b> , personally served 06/12/2012.  Paternal grandfather: Ray Dean Paternal grandmother: Brenda Dean - <i>Objection and Competing Petition filed 6-13-12</i>  Maternal grandfather: Fortino Rocha Perez Maternal grandmother: Stacey R. Hanson  <b>Petitioner alleges:</b> parents are unable to provide for the minor with the proper care. Father will be serving a four year prison term for stealing ATMs. Mother is abusing Meth. Child has been residing with the Petitioner the majority of the time. Mother allowed the child to visit with the Father. Petitioner fears that with the Father's pending prison sentence that he may flee with the child.  <b>Objection filed 06/13/2012</b> – Paternal grandparents state that they believe the minor child would be better off with them as they have been married for 26 years, attend church, have owned their own home for 12 years and are financially stable. They believe that both the Mother and Father of the child do not agree to Petitioner, Stacy Hanson, being the guardian.  Objectors filed a declaration on 06/18/2012 consisting of various letters supporting their petition for guardianship set for hearing on 06/26/2012.  <b>Petitioner filed a declaration on 6-20-12</b> that attaches letters in support of her petition, and UCCJEA indicating that the minor has been with either her or the mother for the past five years.		
<b>Cont. from 062012</b>				
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>	w		
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	<b>Aff.Pub.</b>			
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	<b>Letters</b>			
✓	<b>Duties/Supp</b>			
✓	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
✓	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
		<b>Reviewed by:</b> LEG / LV / skc <b>Reviewed on:</b> 06/14/2012 <b>Updates:</b> 6/22/12 <b>Recommendation:</b> <b>File 18A - Ward</b>		

Atty Hanson, Stacey R (Pro Per – Petitioner – Maternal Grandmother)

Atty Dean, Raymond (Pro Per –Competing Petitioner- Paternal Grandfather)

Atty Dean, Brenda (Pro Per – Competing Petitioner – Paternal Grandmother)

## Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Age: 4 DOB: 01/15/2008		<b>TEMPORARY EXPIRES 06/26/2012 (Maternal Grandmother Stacey R. Hanson was appointed Temporary Guardian.)</b>  <b>GENERAL HEARING 08/08/2012</b>  <b>RAYMOND and BRENDA DEAN</b> , Paternal Grandparents, are Competing Petitioners.  <b>STACEY R. HANSON</b> , Maternal Grandmother, filed a Petition for Appointment of Guardian on 6-7-12 (Page 18A).  Father: <b>JAMES WARD</b>  Mother: <b>MEIGHANN MARIA PEREZ-HANSON</b> ,  Maternal grandfather: Fortino Rocha Perez  <b>Competing Petitioners state</b> the mother is unstable, doing drugs, and the father has no right to him. Petitioners will love him and keep family and church in his life. They would never keep him away from his family.  Petitioners request to be excused from giving notice to the father because he is in Fresno County Jail and to the mother because she does not answer the phone number they have.  Declaration filed 6-18-12 provides letters in support of the Deans' petition.  <b>Note:</b> Maternal Grandmother Stacey Hanson's declaration filed 6-20-12 states: PI would like to make a plea for the Court to petition the medical records of Raymond Dean, who took a firearm to Clark (his employment) School on 5 <sup>th</sup> St in Clovis, Ca, It will make an enlightenment of the stability of the Dean household and is a great concern for me being that Raymond's coping skills are to use violence and anger."	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Hearing.  2. If notice is not excused per Petitioners' request, need proof of service of Notice of Hearing with a copy of the Temporary Petition at least five Court days prior to the hearing per Probate Code §2250(e) on: - James Ward (father) - Meighann Maria Perez-Hanson (Mother)																																																																			
<table border="1"> <tr><td></td><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td>✓</td><td>Verified</td><td></td></tr> <tr><td></td><td>Inventory</td><td></td></tr> <tr><td></td><td>PTC</td><td></td></tr> <tr><td></td><td>Not.Cred.</td><td></td></tr> <tr><td></td><td>Notice of Hrg</td><td>X</td></tr> <tr><td></td><td>Aff.Mail</td><td>X</td></tr> <tr><td></td><td>Aff.Pub.</td><td></td></tr> <tr><td></td><td>Sp.Ntc.</td><td></td></tr> <tr><td></td><td>Pers.Serv.</td><td>X</td></tr> <tr><td>✓</td><td>Conf. Screen</td><td></td></tr> <tr><td>✓</td><td>Letters</td><td></td></tr> <tr><td>✓</td><td>Duties/Supp</td><td></td></tr> <tr><td></td><td>Objections</td><td></td></tr> <tr><td></td><td>Video Receipt</td><td></td></tr> <tr><td></td><td>CI Report</td><td></td></tr> <tr><td></td><td>9202</td><td></td></tr> <tr><td>✓</td><td>Order</td><td></td></tr> <tr><td></td><td>Aff. Posting</td><td></td></tr> <tr><td></td><td>Status Rpt</td><td></td></tr> <tr><td>✓</td><td>UCCJEA</td><td></td></tr> <tr><td></td><td>Citation</td><td></td></tr> <tr><td></td><td>FTB Notice</td><td></td></tr> </table>					Aff.Sub.Wit.		✓	Verified			Inventory			PTC			Not.Cred.			Notice of Hrg	X		Aff.Mail	X		Aff.Pub.			Sp.Ntc.			Pers.Serv.	X	✓	Conf. Screen		✓	Letters		✓	Duties/Supp			Objections			Video Receipt			CI Report			9202		✓	Order			Aff. Posting			Status Rpt		✓	UCCJEA			Citation		
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Pro Per Guerrero, Leticia P. (Pro Per Petitioner, paternal aunt)  
 Pro Per Rangel, Cruz (Pro Per Petitioner, paternal uncle)

Petition for Appointment of Temporary Guardianship of the Person  
 (Prob. C. 2250)

Albert Age: 7 yrs		<p align="center"><b><u>General Hearing set for 8/14/2012</u></b></p> <p><b>LETICIA GUERRERO</b> and <b>CRUZ RANGEL</b>, paternal aunt and uncle, are Petitioners.</p> <p>Father: <b>ALBERT GUERRERO</b>; <i>incarcerated (Wasco)</i>;</p> <p>Mother: <b>SYLVIA TORRES</b>; <i>Deceased (6/8/2012)</i></p> <p>Paternal grandfather: <b>Albert Guerrero, Sr.</b>; <i>incarcerated (Avenal)</i>;</p> <p>Paternal grandmother: <b>Sally Guerrero</b></p> <p>Maternal grandfather: <b>Unknown</b></p> <p>Maternal grandmother: <b>Unknown</b></p> <p><b>Petitioner Leticia Guerrero states</b> she and the child's mother had been friends since they were children and the mother later had the child with Petitioner's brother, who has stated he would like Petitioner to be the child's guardian. Petitioner states the child's mother died on 6/8/2012 and she left the child with his step-father, Danny, who informed Petitioner of the mother's death and gave the child to Petitioner.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need <i>Notice of Hearing</i>.</li> <li>2. Need proof of five (5) court days' notice by personal service of the <i>Notice of Hearing</i> and a copy of the <i>Petition for Appointment of Temporary Guardian</i>, or <i>Consent to Appointment of Guardian and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i> for:           <ul style="list-style-type: none"> <li>• Albert Guerrero, father.</li> </ul> </li> </ol>	
DOB: 9/13/2004				
Cont. from				
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<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: LEG
Reviewed on: 6/22/12
Updates:
Recommendation:
File 19 - Guerrero